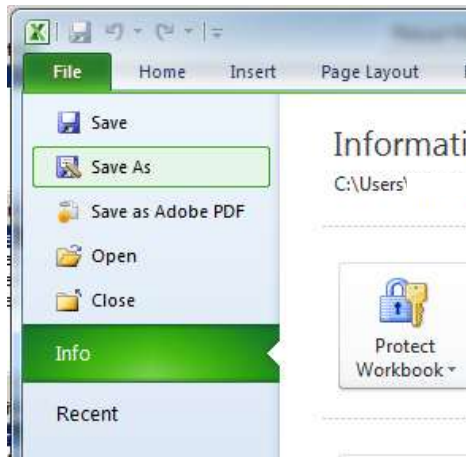Exporting CFRS Bulk upload data from Microsoft Excel 2007/2010

This document will provide instructions for exporting data from Microsoft Excel 2007/2010 to text file (txt) for bulk upload into CFRS. This process applies to all file types: Fundraisers, Contributions and Expenditures.

With workbook open, in the upper left corner select **File, Save As…**

In the save dialog box, select the save location of your choice. Select **CSV(Comma delimited)** from the Save as type drop down. Provide file name in accordance with the CFRS instructional documents found here: http://www.sos.wv.gov/elections/Pages/CFRSdatahowto.aspx
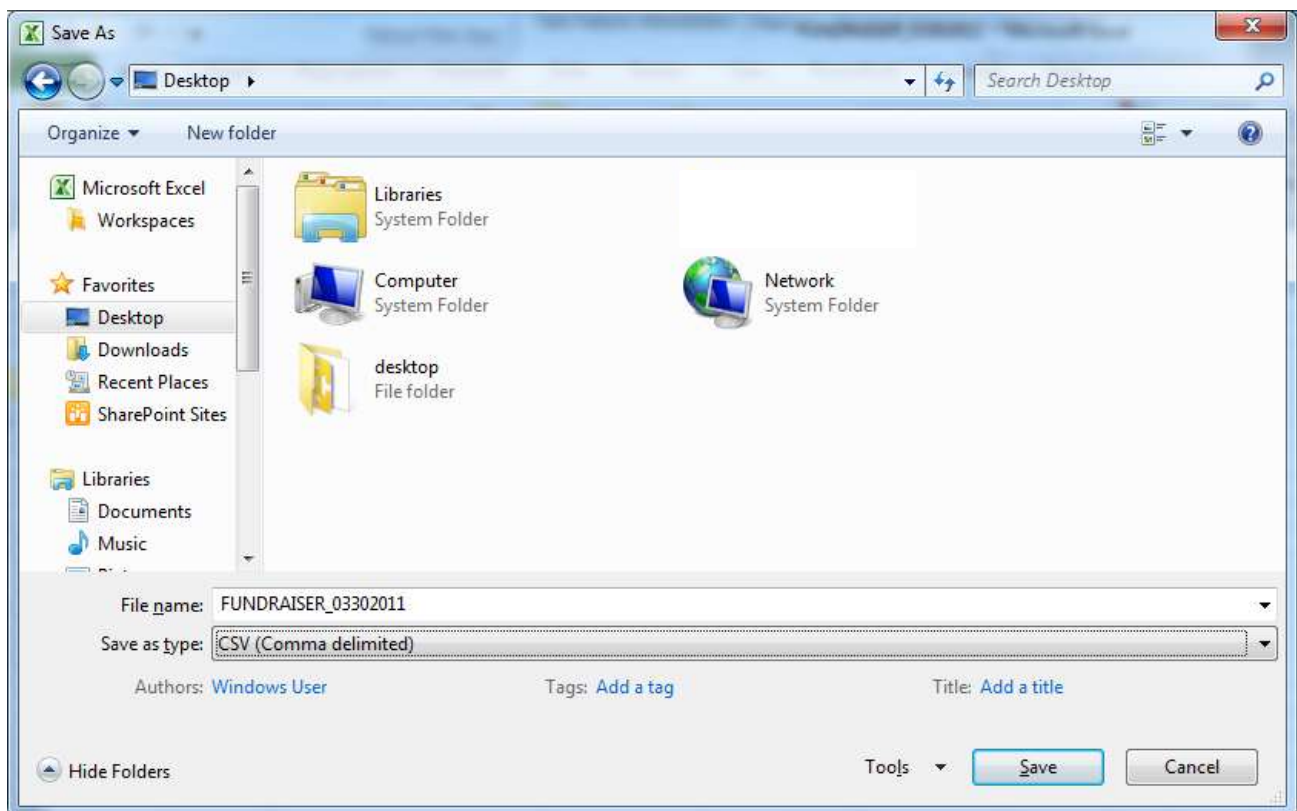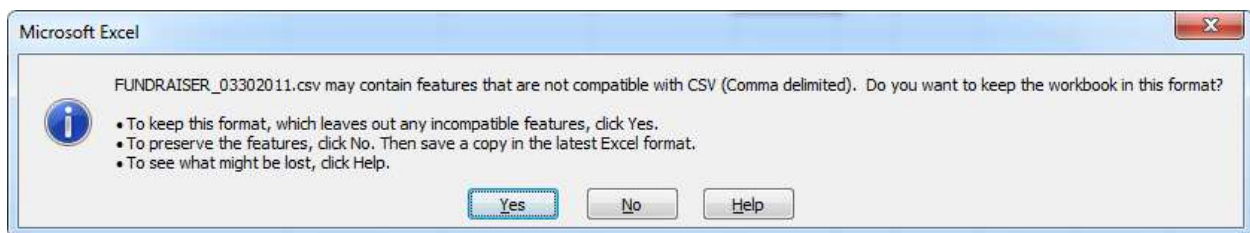
Click Save to save the file to the selected location
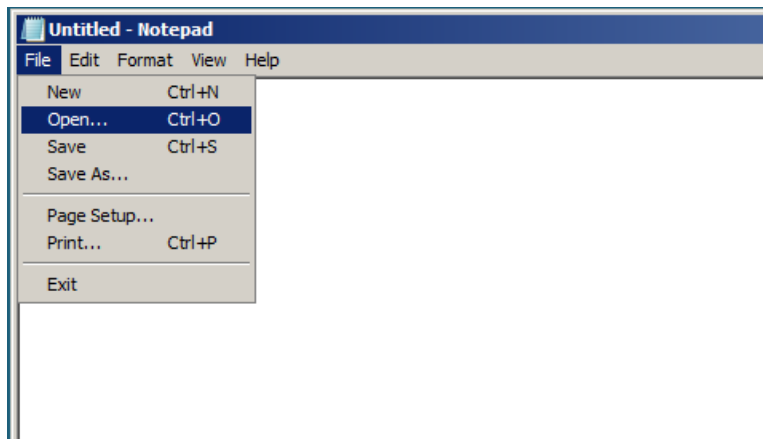
If an error message appears, select **OK**.
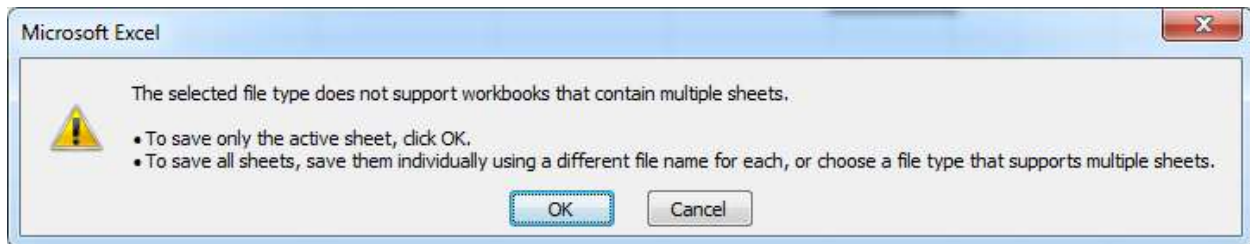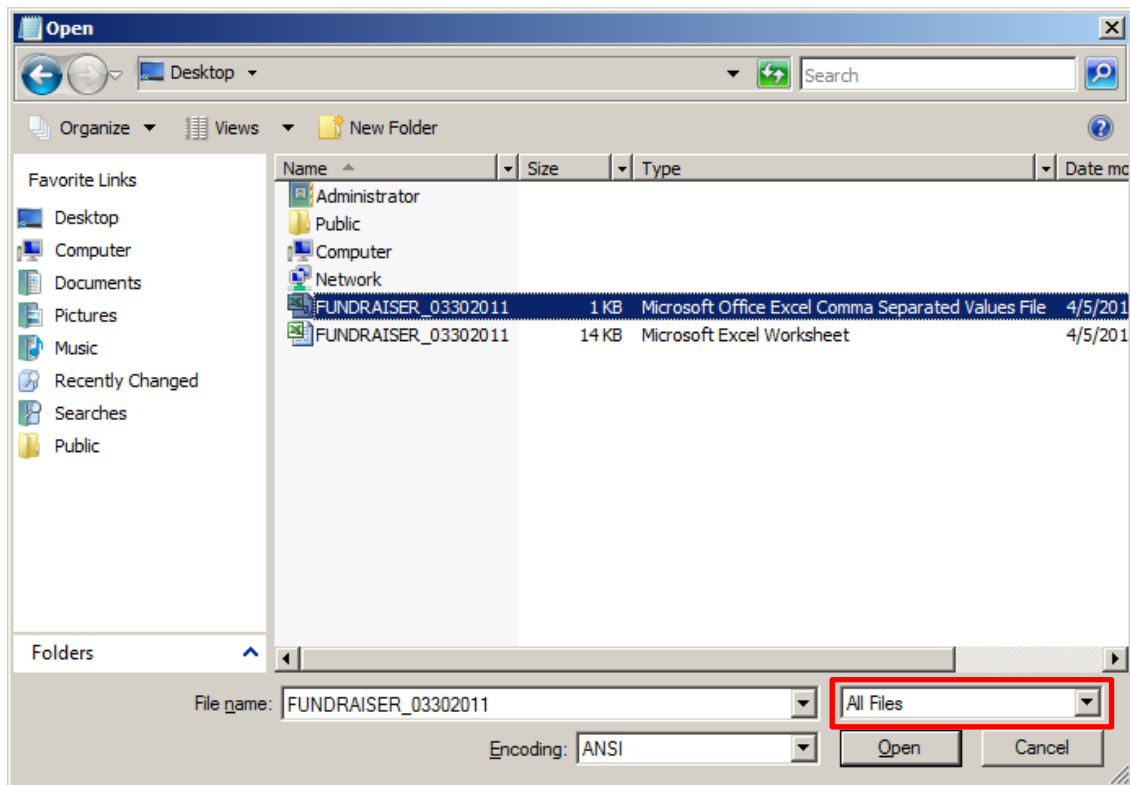

Select yes to keep the workbook in the CSV format

Close Microsoft Excel 2007/2010, and open Notepad.

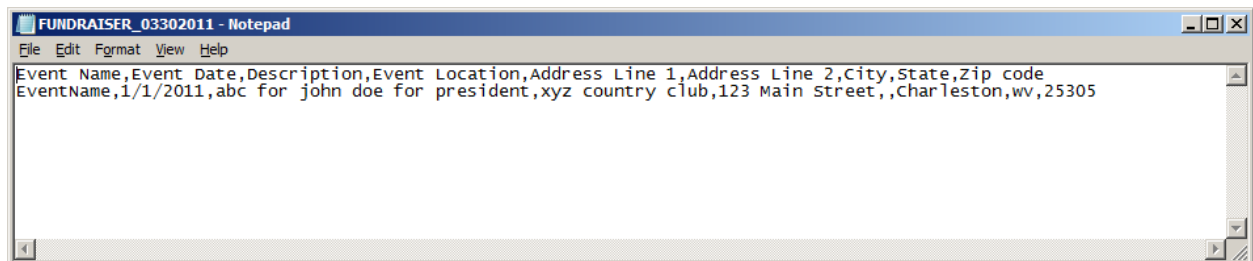Select **File** then **Open…** from the top toolbar

In the Open file dialog screen change file type to **All Files** and select the location where the CSV exported from excel, then click **Open**
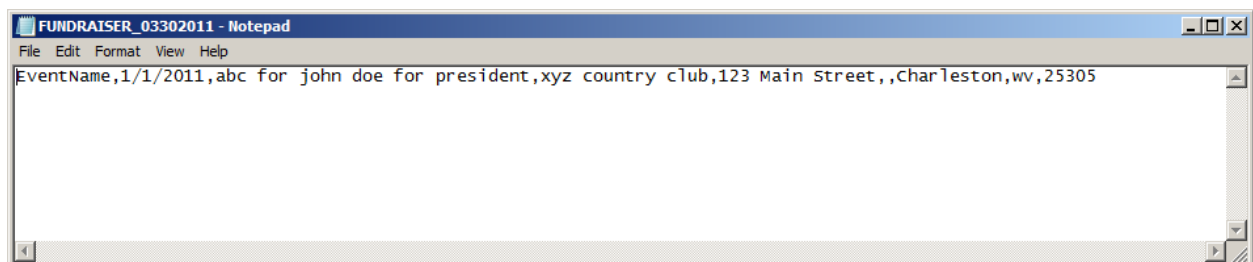

With CSV open, remove the first row that contains header information. *this step is only necessary if your excel file contained headers*
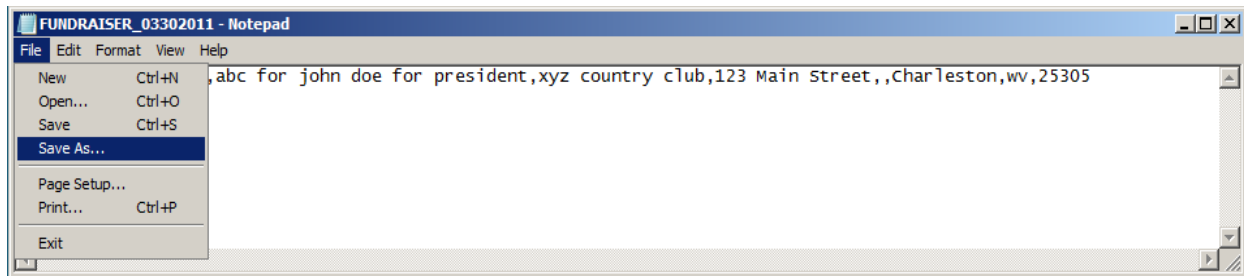
With header information

Without header information

Once headers are removed, select **File** then **Save As…** from the top toolbar

In the save file dialog box, Select **All Files** from the Save as type drop down box. Ensure that the filename conforms to the requirements specified in the instructional documents found here:
http://www.sos.wv.gov/elections/Pages/CFRSdatahowto.aspx *make sure that the file name ends in .txt
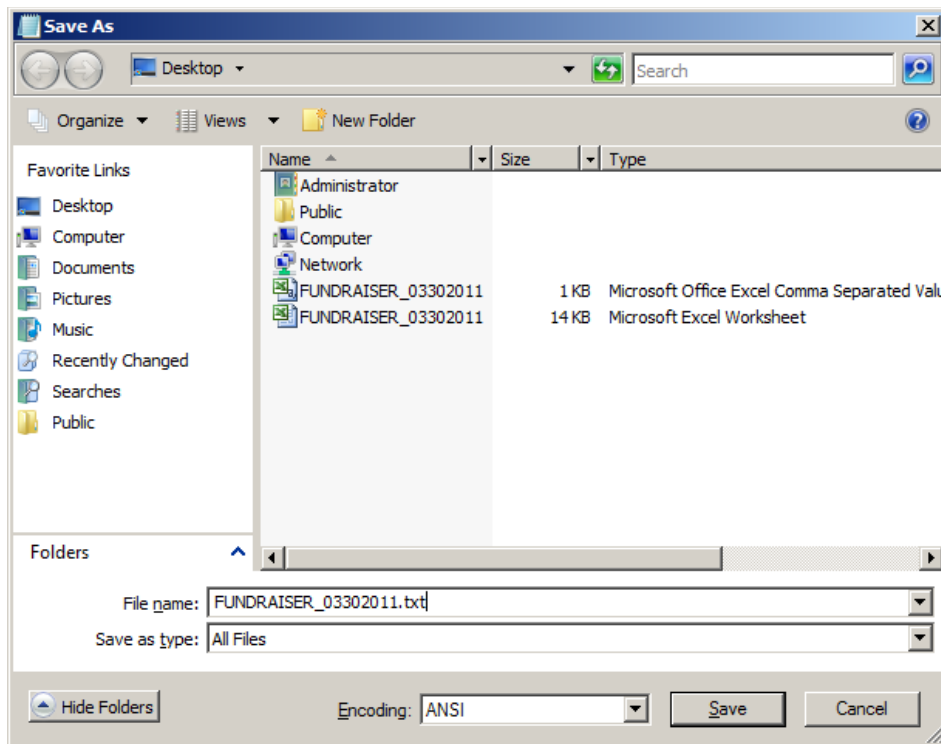
Click **Save** to save the file to the location of your choice for upload.